A Message from the President

It’s hard to believe that this is my final message as President of the Nassau Chapter; it has been a very busy year with a bunch of new firsts. One year is not a long time in this job so new ideas and initiatives must be conceived early, moved on and carried on by others when you leave office.

During the year, with the Board’s support, we reinstituted the Sponsorship Committee, as a more formal way of bringing sponsorship to the Chapter for its committees and events. We have been successful in getting new member lists from the State Society so we can reach out to them. We are in the process of planning a Member Appreciation event to draw more members to active involvement in the Chapter, as well as a membership survey so that we can determine how to improve the Chapter activities and leadership. We moved the All-Day Accounting and Auditing event to a weekday and are moving in that direction for the All-Day Tax Conference as well. We now (for the first time) have had tax seminars videoed for rebroadcast at the Chapter, something I’m sure we will be using many times in the future. We’ve also been able to get the State Society to streamline the contract approval process for Chapter committee events. We created a new level of sponsorship for the Installation Dinner. We’ve brought in another nonprofit to benefit from our programs, the Interfaith Nutrition Network (INN). We are looking into sponsorship to our annual Ethics event to offset the fee increase from the State Society. We’ve gained assurances from the State Society that they will bring our ideas forward of the concept of internship credits for fifth year accounting students, a dual membership structure for non-CPAs in a firm and a higher fee for non-CPAs not affiliated with the profession, new data analytics topics to be offered by the FAE, and rethinking of the new Ethics course fee model.

It took a few years, but we’ve finally organized our events and finances with new systems and software. It has significantly improved attendance at events and is now an invaluable resource for our Chapter. It took a lot of work from Committee Chairs, Board members and Vivian Levy and Kathleen Becker to get us to where we are now and for that I am grateful.

This year we formed new partnerships with some other organizations and stronger bonds with the ones we always had partnerships with. Our relationship with the Suffolk Chapter of the NYSSCPA, NCCPAP and the Nassau Bar Association has never been better.

Over the past year our 22 committees have held over 35 education meetings. In addition, we held the Ellen Gordon Run/Walk, the COAP event, the Annual Golf Outing, the Attorney/Accountants Networking event, two Networking with Accountant Events, a Student Night/Job Fair, and our events supported nonprofit efforts such as the COAP Program, the NYSSCPA Moynihan Fund, Island Harvest and the Interfaith Nutrition Network (INN). I am privileged and honored to have been able to serve and to serve with so many dedicated and caring individuals as Executive Board members, Directors, Committee Chairs, volunteers, speakers and others who help the Chapter do what we do.

On May 30 at the Crest Hollow Country Club, Alex Resnick will be installed as the 65th President of the Nassau County Chapter. It promises to be a great night of celebration, networking and fun. Alex will be busy this next year fulfilling many new initiatives our Executive Board has approved. I hope you will be as supportive to him as I am.

Continued on page 2.
A Message from the President (continued)

We are also installing our new officers President-Elect Natalie Verbanac, Vice President Geri Gregor, Treasurer Vivian Martinez and Secretary Mark Cuccia. The Directors for the 2018-2019 year are Wei Xu, Jean David Chery, Jarred Berman, Iola Damante, Kristina Albarella, Jack Angel, Craig Morris, and Alyssa Popov. Congratulations to all who are being honored. I want to thank Nanette Watts, Ken Rick and Ken Hauptman who served as Directors for the past two years. I would also like to thank the President’s Advisory Committee, Past Presidents Scott Sanders and Lisa Haynie.

Two people will also be honored at the dinner on May 30. Rita Buttermilch will receive the Sam Traum Award, an award given to an individual who promotes education and advancement of young people. Rita has been an accounting and taxation professor at SUNY Westbury for many years and a member of the Cooperation with Higher Education Committee for the Chapter as well. Her contributions to the education and advancement of students is remarkable and now, award-winning. Our Chapter will also be bestowing its Appreciation Award to Vivian Levy, someone who works tirelessly for the Chapter by putting together the very newsletter you are reading, organizing the efforts for the sponsorship, the journal and other important aspects of the Installation Dinner each and every year, and putting together financial reports for the Treasurer. It’s amazing how much she accomplishes for us. The Chapter could not run as efficiently as it does without Vivian's years of dedication and for that we are eternally grateful.

We have the golf outing on August 9, 2018 and the Ellen Gordon walk/run on July 12, 2018. Also, we will be assisting NCCPAP in honoring Susan Gallo in the Gallo 2nd Annual Blood Drive on July 14, 2018. We will be holding our Organizational meeting for Committee Chairs on June 7, 2018.

We also had some sad news recently in the Chapter in that another of my long-time friends, colleague and fellow Hofstra professor Harold Finkelstein passed away. Harold was a very successful tax attorney who spent many years at the IRS as Chief of the Long Island Appeals office before retiring to practice on “the other side.” He was a fixture at many Chapter events and will be missed by many whose life was blessed to not just be in his circle, but also to be his friend.

Thank you for the honor and opportunity to serve as the 64th President of the Nassau Chapter of the NYSSCPA. Looking back, I tried to make changes for the long-term benefit of the Chapter, particularly to draw young people in to make the Chapter a more inviting opportunity for younger professionals to become part of. I tried to personally go to as many Chapter events and committee meetings as I could. In the end, I did what I came here to do, I started the discussion about the disconnect that I saw between the profession and the University and sought to build a bridge between the two. We now have a Student Night and Job Fair with almost 140 students and 16 firms recruiting, we have a seat at the Board for Student Chapters, we have a new Student Chapter in the works, we have some ideas that the State Society is taking up as it relates to the college student. As I leave the Presidency now, I was asked to fill a seat on the New York State Board of Public Accountancy and will be considering that as the next way to best serve the profession that has been so good to me.

I made a promise at my installation dinner that I would not let you down and hope that I fulfilled that promise.

Sincerely,

Anthony Basile, Ph.D., CPA, CVA, CFE
President, Nassau Chapter
Message from the President ...................................... 1
Newsletter Overview & Useful Information ........................ 3
Upcoming: The 65th Annual Installation Dinner ................... 4
Nominating Committee ........................................... 5
Free CPA Credits ............................................... 6
In the News .................................................. 7-11
Upcoming Meetings and Events .............................. 12-22
Event Highlights ............................................. 23-28
Committee Application ........................................ 29
Information and Hotlines ....................................... 30
Newsletter Deadlines .......................................... 30
Change Form ................................................ 30

CFO & Financial Executives
Tuesday, 5/15
Utilizing and Understanding Trusts for Estate Planning
Grassi & Co., Jericho
8:00 – 10:00 AM

Small-Firm MAP
Thursday, 5/17
Mergers & Acquisitions
On Parade Diner, Woodbury
8:00 – 10:00 AM

65th ANNUAL INSTALLATION DINNER
Wednesday, 5/30
Crest Hollow Country Club, Woodbury
6:30 PM

Chapter Officials:

PRESIDENT
Anthony Basile, CPA

PRESIDENT ELECT
Alex Resnick, CPA

VICE PRESIDENT
Natalie Verbanac, CPA

TREASURER
Geri Gregor, CPA

SECRETARY
Vivian Martinez, CPA

DIRECTOR (PAST PRESIDENT)
Lynne M. Fuentes, CPA

DIRECTORS
Mark R. Cuccia, CPA
Kristina Albarella, CPA
Iola Damante, CPA
Jarred R. Berman, CPA
Kenneth Rick, CPA
Nannette Watts, CPA
Kenneth Hauptman, CPA
Wei Xu, CPA

ACCOUNTING & AUDITING
Mark R. Cuccia, CPA
Tina M. Romano, CPA
Franco Martorana, CPA

ATTORNEY & ACCOUNTANTS
Kristina Albarella, CPA
Anthony Basile, CPA

CFO & FINANCIAL EXECUTIVES
Anthony Aronica, CPA
Joanne Krush, CPA

COMMUNITY AFFAIRS & PUBLIC RELATIONS
Kenneth Rick, CPA

COOPERATION WITH EDUCATIONAL INSTITUTIONS
Anthony Basile, CPA
Abby Lucrezia

EMPLOYEE BENEFITS
Michael J. Corkery, CPA
Tina M. Isbitsky, CPA

ESTATE & PERSONAL FINANCIAL PLANNING
Pamela Diamond, CPA
Eric M. Kramer, CPA, Esq.
Stuart R. Shapiro, CPA
Scott Sanders, CPA

FINANCIAL LITERACY
Lawrence M. Just, CPA

LITIGATION & FORENSIC SERVICES
Pasquale Rafanelli, CPA

MANAGEMENT OF ACCOUNTING PRACTICES
Louis Grassi, CPA

MEMBERSHIP
Scott Sanders, CPA

NETWORKING WITH ACCOUNTANTS
Neal Koenenberg, CPA

NEWSLETTER
Natalie Verbanac, CPA
Lynne M. Fuentes, CPA

NEXTGEN COMMITTEE
Wei Xu, CPA
Jean David Chery, CPA
Garrick Turano, CPA
Alyssa Popov, CPA

NEXTGEN LIAISON
Lynne M. Fuentes, CPA

PRESIDENT’S ADVISORY COMMITTEE
Scott Sanders, CPA
Lisa Haynie, CPA

PRACTICE CONTINUITY & SUCCESSION PLANNING COMMITTEE
Larry Bloom, CPA
Eliot Lebenhart, CPA
Craig R. Morris, CPA

REAL ESTATE COMMITTEE
Vivian Martinez, CPA
Jodi Bloom-Piccone, CPA
Deana Wetzel, CPA

SMALL PRACTICE UNIT MAP
Kenneth Hauptman, CPA
Eliot Lebenhart, CPA
Alex Resnick, CPA

SPONSORSHIP COMMITTEE
Lynne M. Fuentes, CPA
Roseann Murphy-Almeida
Elizabeth Oberg, CPA
Natalie Verbanac, CPA

TAXATION COMMITTEE
Robert S. Barnett, CPA
Robert J. Schaffer, CPA

WOMEN’S FOCUS GROUP
Geri Gregor, CPA
Lisa Haynie, CPA
Elizabeth Oberg, CPA
Natalie Verbanac, CPA

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Connect With Us On LinkedIn
www.linkedin.com/groups?gid=5010322&mostPopular=6&trk=tyah&trkinfo=as%3Anysscpa%20nas

Save the Dates:

MAY 2018

CFO & Financial Executives
Tuesday, 5/15
Utilizing and Understanding Trusts for Estate Planning
Grassi & Co., Jericho
8:00 – 10:00 AM

Small-Firm MAP
Thursday, 5/17
Mergers & Acquisitions
On Parade Diner, Woodbury
8:00 – 10:00 AM

65th ANNUAL INSTALLATION DINNER
Wednesday, 5/30
Crest Hollow Country Club, Woodbury
6:30 PM

JUNE - AUGUST 2018

Committee Chair Organizational Meeting
Thursday, 6/7
More information to follow.

Small-Firm MAP
Wednesday, 6/13
Current Labor Issues & Recent Legal Charges
On Parade Diner, Woodbury
8:00 – 10:00 AM

15th Annual Ellen Gordon CPAs 4(a): Cause
Thursday, 7/12
Eisenhower Park, Fields 1 & 2, East Meadow
Registration: 4:30 PM
Race Time: 7:00 PM

SUSAN GALLO BLOOD DRIVE
Saturday, 7/14
In Honor of Susan Gallo
Huntington Station
12:00 – 6:00 PM

Practice Continuity Committee
Friday 7/27
Organizational Meeting & Roundtable Discussion-Continuity & Succession Planning
On Parade Diner, Woodbury
8:00 AM

Networking with Accountants Golf Outing
Thursday, 8/9
North Hills Country Club, Manhasset
10:30 AM Registration & Brunch
12:00 PM Shotgun
5:30 PM Cocktails/Dinner

Like Us On Facebook
www.facebook.com/NYSSCPANassau
Connect With Us On LinkedIn
www.linkedin.com/groups?gid=5010322&mostPopular=6&trk=tyah&trkinfo=as%3Anysscpa%20nas
UPCOMING: THE 65TH ANNUAL INSTALLATION DINNER

65th Annual Nassau Chapter Installation Dinner
Wednesday, May 30, 2018 | 6:30 p.m.
Crest Hollow Country Club, Woodbury

Come Celebrate the 65th Anniversary of the Nassau Chapter

☐ NEW: PLATINUM SPONSOR: $2400
  Recognition on the podium
  Full-page ad in event program
  Ten (10) tickets to the event*
  Signage at the event

☐ BRONZE SPONSOR: $900
  Recognition on the podium
  Quarter-page ad in event program
  Four (4) tickets to the event*
  Signage at the event

☐ NEW: WINE SPONSOR: $300
  Recognition in event program
  Signage on every table

☐ GOLD SPONSOR: $2000
  Recognition on the podium
  Full-page ad in event program
  Eight (8) tickets to the event*
  Signage at the event

☐ NEW: COCKTAIL HOUR SPONSOR: $800
  Recognition on the podium
  Recognition in event program
  Six (6) tickets to the event*
  Prominent signage at the event

☐ SILVER SPONSOR: $1400
  Recognition on the podium
  Half-page ad in event program
  Six (6) tickets to the event*
  Signage at the event

☐ NEW: GIFT SPONSOR: $450
  Podium recognition during prize drawing
  Eighth-page ad in event program
  One (1) ticket to the event*
  Signage at the event

☐ NEW: WINE SPONSOR: $300
  Recognition in event program
  Signage on every table

PROGRAM ADVERTISING:

☐ Full-Page Ad: $1200 (7 ¼" x 9 ¾")
☐ Half-Page Ad: $700 (7.25" x 4.75")
☐ Quarter-Page Ad: $450 (3.5" x 4.75")

☐ Eighth-Page Ad: $225 (3.5" x 4.75")
☐ Business-Card Ad: $125 (3.38" x 2")
  (Submit Original Business Card)

TICKETS & TABLES: Table of 10: $950  Individual Tickets: $100 per person
TICKET/TABLE RESERVATIONS: To: VivianLevy1@gmail.com no later than Friday, May 11, 2018.

NAME: ________________________________  NAMES OF ATTENDEES:

FIRM NAME: ________________________________
ADDRESS: ________________________________
CITY/STATE/ZIP: ________________________________
TELEPHONE: ________________________________
EMAIL: ________________________________

BY CHECK: Payable to NYSSCPA Nassau Chapter
Mail to: Vivian Levy
c/o Katz Viola Lebenhart & Mauro, LLP
415 Crossways Park Drive, Suite C
Woodbury, NY 11797

By CREDIT CARD VIA PAYPAL: Click HERE

* Paypal link for table and individual registrations only.
All sponsorships and advertising will be billed by Vivian Levy.
NASSAU CHAPTER

Report of the 2018-2019 Nominating Committee

April 9, 2018

NOMINATING COMMITTEE:
Chair: Philip H. Kanyuk, CPA
Elizabeth Haynie, CPA
Robert Barnett, CPA

The Nominating Committee is proud to announce the Slate for the 2018-2019 Year:

OFFICERS:
PRESIDENT Alex Resnick, CPA
PRESIDENT-ELECT Natalie Verbanac, CPA
VICE PRESIDENT Geri A. Gregor, CPA
TREASURER Vivian Martinez, CPA
SECRETARY Mark R. Cuccia, CPA

DIRECTORS:
Kristina Albarella, CPA One-Year Term ending 5/31/19
Jarred Berman, CPA One-Year Term ending 5/31/19
Jack Angel, CPA One-Year Term ending 5/31/19
Iola Damante, CPA One-Year Term ending 5/31/19
Wei Xu, CPA Two-Year Term ending 5/31/20
Craig Morris, CPA Two-Year Term ending 5/31/20
Jean D. Chery, CPA Two-Year Term ending 5/31/20
Alyssa Popov, CPA Two-Year Term ending 5/31/20

THE FOLLOWING ARE AUTOMATICALLY SELECTED:
DIRECTOR (PAST PRESIDENT) Anthony Basile, CPA
PRESIDENT Alex Resnick, CPA

Voting will be held on May 15, 2018 at the offices of Wild, Maney & Resnick, LLP, 185 Froehlich Farm Blvd., Woodbury, NY 11797
**FREE CPE CREDITS**

Attention All Nassau Chapter Members

Get CPE Credits FREE

All Students, NYSSCPA Millennials, and NYSSCPA Members for less than 5 years attend a 2 credit or less CPE event for FREE!!

If you are a member and BRING the aforementioned to a 2 credit or less CPE event, than you can come for FREE as well!!!

*(To attend more than 1 CPE session free, you must bring a different person.)*

As Oprah might say ....YOU GET CPE!!!! YOU GET CPE!!!! YOU GET CPE!!!! We ARE ALL GETTING CPE!!!!

**CPE**

**MUST PRE-REGISTER with COUPON**

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Rita Buttermilch is very honored to receive the Samuel B. Traum Achievement Award. Sam was a leader in the New York State Society of CPAs-Nassau Chapter when Rita first joined the Society, so she saw first-hand what a dedicated leader he was. She admired his efforts to help further the education of students, women and minorities, which is why this Award is so meaningful to her.

Rita Buttermilch began her teaching career at Long Island University (C.W. Post campus) in 1982. In 1984 she joined the faculty at State University of New York-College at Old Westbury where she is an Associate Professor. She has received the SUNY Chancellor’s Award for Excellence in Teaching, the SUNY Old Westbury Alumni Association Excellence in Education Award and the Dean’s Award for Excellence in Teaching. She became a Certified Public Accountant in 1982 and is also a Chartered Global Management Accountant. In addition to consulting activities, her experience includes working full-time for KPMG, Bristol-Myers Squibb and A.A. World Services. She taught for 10 years in the Person Wolinsky CPA Review course. Along with her colleagues, she has published several articles in *The CPA Journal*.

Rita joined the New York State Society of CPAs in 1984. Her primary service to the Society has been serving as a bridge between the accounting students and the profession. Even as far back as the late 1980s when the Nassau Chapter ran a five session orientation for new employees of accounting firms, Rita was involved as an instructor in this endeavor. She has continuously served on the Nassau Chapter’s Cooperation with Education Committee as member, Secretary, Chairperson and Co-Chairperson. She has helped run Student Night since it began in 1992. The evening involves inviting accounting students from many local colleges to familiarize them with licensing requirements and techniques for securing an accounting position. It also affords students an opportunity to network with members of the NYSSCPAs.

Rita also served for several years as the liaison in what was the Long Island CPA Candidates Association, which helped recent accounting graduates who had not yet become certified, be involved with the NYSSCPA. She also helped the NYSSCPA make the transition from the separate Candidates Association to the new category of Student Associate membership in the Society. She continues to serve as the Campus Liaison for the NYSSCPAs at SUNY-College at Old Westbury. Rita is very grateful to the NYSSCPA Nassau Chapter for this honor and looks forward to continuing to help to serve as a bridge from students to the profession.
Alex Resnick’s career began just like that fateful trip on “Gilligan’s Island.” As we all remember from the catchy opening tune of that iconic ’70s sitcom, the consequential voyage was only supposed to be a “three-hour tour.” Similarly, Alex’s crucial journey into accounting was supposed to last just three months—while his father’s main employee was out on maternity leave. As it turns out, neither Gilligan nor Alex ever left the “island.”

“I agreed that for three months I would help my father out...three decades later, here I am. What happened was, I actually enjoyed working for him and with him, and was very good at this type of work. So, I started to work with him full-time. Our firm was named Mintz & Resnick before we merged with Wild & Maney about 14 years ago.”

Now at the thirty-year mark, Alex’s successful accounting career is continuing to flourish, as he serves in the prestigious role of Partner at his firm, Wild, Maney & Resnick, and is about to become President of the Nassau Chapter of the NYSSCPA. Times are (extremely) busy, but good.

But he’s used to hectic. With four kids, he’s been “fundamentally busy” for a very long time. “Between their sports, activities, games and trips, family life is full.” For fun, he loves doing almost anything outdoors, and especially, traveling. For good times out of the sun, there is always the casino.

Not that he has much time for anything “outside” work. Heading up a practice is hard work, with very long hours. With his firm specializing in manufacturing, food distribution services, restaurants, construction and the petroleum industries, in addition to advising his clients in the areas of accounting and tax planning, Alex counsels them in the areas of business succession planning and business entity selection.

“Most of my time is really spent consulting with clients,” Alex recounts. “I counsel them regarding their operations, on just how their business is doing and what can be done to improve it.” He basically practices full-time problem-solving. “I look into areas my clients should improve, as well as tax and future planning considerations; whether they should complete that merger or make those sales acquisitions.”

It all began with his dad, who was his main inspiration growing up, and taught him the business from the ground up. But Alex had another major influence in his teenage years—a music teacher back in Amityville named Everett Collins, who was an extremely successful musician; he worked as a tour drummer for The Isley Brothers. Despite his commercial success, Collins decided to stay on as a teacher because he enjoyed helping kids.

“The Amityville schools were not great,” remembers Alex, “and Collins just really pushed the students to work on what they cared about; he got everybody to stay on the straight and narrow. I remember admiring him because he was a person who did something for the love of it, not just the money.”

After high school, Alex attended the State University of New York at Albany and earned a BA in Economics.
“I really wasn’t sure what I wanted to do yet. I knew I wanted to do something in the business field, so I worked in management for several retail companies. But I was in a spot where I wasn’t that happy when the opportunity came up to work with my dad. I thought I would use that time as a transition period (for just a few months), and then go back to school for my masters.” Instead, he caught the “accounting bug” from his father and changed his major to accounting. Alex went on to achieve an MS in Accounting from LIU Post.

Father and son worked together for a time, then acquired a practice together. Fourteen years ago they merged that practice to form Wild, Maney & Resnick. The rewards are many at his firm, but perhaps the greatest part for Alex is the gratitude he receives from a client for a job well done. “There’s nothing better than a ‘thank you’ from a client, one that really appreciates what you’ve been able to do for them.”

Not that there aren’t challenges that face him every day. “Whether it’s the ever-changing tax environment, staffing issues or managing workflow, we are always hard at work to keep the practice moving forward.”

“We have an almost 30-person firm, so managing staff and workflow is always an issue, as well as working to meet our clients’ needs. It’s also a very challenging environment these days, with the new tax laws and policies, and the constantly changing compliance requirements as they relate to audit and review work.”

On top of his commitment to his company, Alex devotes much time and effort to his role as Co-Chair on the Small Firm MAP Committee at the NYSSCPA. “Our role there is to help each other with the day-to-day operations of a firm. In dealing with smaller practitioners, we realize that they don’t always have all the resources that a larger practice has. So we learn from each other how to deal with a variety of issues and also, how larger firms deal with the management of their practices. So we talk less about accounting itself and more about managing our businesses.”

“Accountants are always being asked by clients to help them manage their practices, but we have to learn how to manage our own as well.”

As President Elect, his role is varied and extensive: “I work with the President to help him carry out our Chapter’s goals. A lot of it involves planning for the upcoming year. We work on educational and charitable events and on overseeing the various committees, as well as social events for the Chapter as a whole.”

On the Executive Board and in the Small MAP Committee, Alex and his fellow Chairs are working to expand their demographic to include younger members. “We have held some joint meetings with other committees to try and give younger CPAs more experience or more of an understanding of the management side. It’s been very successful and we’ve been seeing a lot of the NextGen members attend our meetings.”

The Board is also focused on setting up charitable events for the greater community, including the annual Ellen Gordon CPAs 5K Run/Walk, that works in conjunction with Island Harvest to end hunger. This year the run will be held July 12 in Eisenhower Park, at 7:00 PM.

They also work on several programs with educational institutions, including a Student Fest in November, where
they strive to give enrollees a better understanding of what occurs in the accounting profession, host a job fair, and assist students with their interviewing skills.

Going forward, Alex would like to see younger CPAs involved in the Small-MAP Committee, so that they can learn the management skills necessary in running their own businesses. “I'm still the youngest person in the room,” he laughs.

But whether it's in the Committee or on the Executive Board, Alex takes pride in his involvement with the Chapter: “It’s been a matter of giving something back to the profession. I've been very fortunate in my career and this is an opportunity to return something to the profession that has rewarded me so well.”

The single biggest challenge to achieving everything he wants in the Chapter is truly one of time. “There's so much that you want to accomplish and yet you still have your own practice to run. So sometimes, the time constraints are very difficult to deal with. We also want to get more people involved and infuse the committees with fresh blood, with new ideas to benefit the Chapter.”

He truly loves being a part of his Committee and is rewarded by the reciprocation in assistance it brings: “While I may be a Co-Chair, we learn as much from the members as they learn from us. It's really a give and take in helping each other.”

This month (on May 30, at Crest Hollow Country Club) will see Alex Resnick installed as the Nassau Chapter's new President. In that role, he sees much to accomplish in the upcoming year. He also plans on continuing his involvement with the Society far into the future, long after his Presidency ends; he has found it extremely rewarding and enjoys the work involved in bettering the CPA community.

He'd also like to give back in even more avenues: “At some point, I'd like to take a turn as an adjunct professor at a local college or university, and find another way to give back to the profession that has treated me so well.”
Nassau Chapter
Practice Continuity Committee

I want to thank Brian Browne for his informative presentation on April 27, 2018, our final meeting of the Chapter year. Brian’s credentials are impressive — CISSP, CISA, CISM and Principal at Mazars USA. As a cybersecurity expert, he made it clear (in plain English) why we need to protect ourselves (and our clients) if we expect a sale of our practices to be part of our succession plans. For those not planning a sale, this meeting also helped us understand how to identify the risks of data breaches, employ best practices for cybersecurity and how to react to attacks, among other concerns. Audience response was overwhelmingly positive. Once again, thanks to Brian for an informative presentation.

Succession planning is an important part of a CPA’s exit strategy, and it’s never too early to begin. The Practice Continuity Committee is a resource to help with that planning, whether for retirement and succession or a strategy in case of death or disability.

For the 2017-18 Chapter year, we held four meetings on these topics:

- key succession planning elements in a partnership agreement;
- the role of marketing in succession planning;
- the role of social security in a CPA’s retirement plan;
- cybersecurity for succession planning.

Our Committee is an educational and networking resource, with goals and activities that include:

- the development of a community of CPA’s to exchange ideas;
- a place for educational resources on practice continuity issues;
- meetings to address topics specific to practice continuity concerns;
- networking events where members can meet and discuss issues;
- a web forum to provide resources and exchange ideas with others who have similar concerns. As a Committee member, you can upload content, send emails, view member profiles and access other services.

Our 2018-19 season will begin on July 27, 2018 with an organizational meeting and a discussion topic to be announced (date subject to change). It will include a roundtable discussion along with an opportunity to discuss your succession planning concerns. If you attend, you’ll be able to influence future meetings and the direction for our committee. Complete the coupon in this newsletter to attend our July meeting or contact us at ginette@morriscpas.com for more information. Please do this early as May is the last Newsletter before our meeting. We look forward to your participation.

Craig Morris, Chairman
CFO COMMITTEE

SAVE THE DATE
TUESDAY, MAY 15, 2018
8:00 - 10:00 AM

Topic: Utilizing and Understanding Trusts for Estate Planning

Speakers: Jeffrey Cohen, Grassi & Company CPAs, P.C.
Alice Varisano, Grassi & Company CPAs, P.C.

Location: Grassi & Company CPAs, P.C.
50 Jericho Quadrangle
Jericho, NY 11753

CPE: 2 Credits

Course Code: 29035836

Register: https://cpe.nysscpa.org/product/29266
NYSSCPA NASSAU CFO COMMITTEE

The CFO & Financial Executives Committee welcomes CPAs in industry to participate in our monthly meetings. The CFO Committee organizes monthly, interactive learning experiences guided by professionals of multiple disciplines. Our committee provides a confidential forum for industry CPAs at a senior level to seek advice, exchange guidance with fellow professionals and develop a resourceful peer group.

Education topics are selected in advance by a group of active committee members. Prior to each seminar the committee allocates time for a “round-table” discussion. Prospective members should be a CFO, VP Finance or the most senior financial person at their company.

The CFO Committee meets monthly from September through May. Meetings are normally held at 8:00 AM at Deloitte’s office in Jericho. We arrange two meetings with the Suffolk Chapter which are held in Melville.

The next CFO committee meeting is:

May 15, 2018 - 8:00 AM to 10:00 AM
Utilizing and Understanding Trusts for Estate Planning
Grassi & Co., 50 Jericho Quadrangle, Jericho, NY 11753

Prior meeting topics have included: (Date, Topic)

<table>
<thead>
<tr>
<th>Date</th>
<th>Topic</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sept. 2017</td>
<td>Revenue Recognition</td>
</tr>
<tr>
<td>Nov. 2017</td>
<td>Service Org. Control Audits</td>
</tr>
<tr>
<td>Feb. 2018</td>
<td>Healthcare &amp; NYS paid Leave</td>
</tr>
<tr>
<td>Apr. 2018</td>
<td>Captive Insurance</td>
</tr>
<tr>
<td>Oct. 2017</td>
<td>GAAP &amp; Lease update</td>
</tr>
<tr>
<td>Jan. 2018</td>
<td>Trusts, Estates &amp; Gift Taxes</td>
</tr>
<tr>
<td>Mar. 2018</td>
<td>Tax Update</td>
</tr>
<tr>
<td>Apr. 2018</td>
<td>Captive Insurance</td>
</tr>
</tbody>
</table>

Meeting time & format: 8:00 to 10:00 AM (2 CPE credits) – light breakfast served, $10 meeting fee

Committee Co-Chairs:

<table>
<thead>
<tr>
<th>Name</th>
<th>Email</th>
<th>Phone</th>
</tr>
</thead>
<tbody>
<tr>
<td>Joanne Krush, CPA, CFO</td>
<td><a href="mailto:jkrush@sterlingrisk.com">jkrush@sterlingrisk.com</a></td>
<td>(516) 773-8605</td>
</tr>
<tr>
<td>Anthony Aronica, CPA, CFO</td>
<td><a href="mailto:aronica3@outlook.com">aronica3@outlook.com</a></td>
<td>(516) 428-6585</td>
</tr>
</tbody>
</table>

Please contact Anthony Aronica or Joanne Krush if you’d like more information.
UPCOMING MEETINGS AND EVENTS

NYSSCPA SMALL-FIRM MAP
Meeting Topics 2018

All dates subject to change

<table>
<thead>
<tr>
<th>Date</th>
<th>Topic</th>
<th>Speakers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Thursday, May 17</td>
<td>Mergers &amp; Acquisitions</td>
<td>Panel Discussion</td>
</tr>
<tr>
<td>Wednesday, June 13</td>
<td>Current Labor Issues and Recent Legal Changes</td>
<td>Ruth Kraft</td>
</tr>
</tbody>
</table>

All meetings will be held at On Parade Diner, 7980 Jericho Turnpike, Woodbury, NY 11797

**Time:** 8:00 – 10:00 AM (full breakfast included)

**Cost:** $25.00 per person, paid in advance

$30.00 for pre-registrations paying at the door – no exceptions

*Please note, meeting dates, topics and speakers are subject to change.*

You can contact your Co-chairmen as follows:

Eliot Lebenhart, CPA  
(516) 938-5219

Kenneth Hauptman, CPA  
(516) 364-8888

Alex Resnick, CPA  
(516) 364-8888

---

**The Robert Katz Endowment at Hofstra University**

The Robert Katz Endowment in Accounting, Taxation and Legal Studies will be established in perpetuity in memory of the significant contributions that Professor Katz has made to Hofstra University, the fields of accounting/taxation and the tremendous reputation he has established. Professor Katz was a Distinguished Professor at Hofstra University, Honorary Alumnus, Teacher of the Year, and an outstanding business and community leader.

Please consider supporting this endowment and help us keep Bob's legacy alive at Hofstra University.

<table>
<thead>
<tr>
<th>NAME</th>
<th>ADDRESS</th>
<th>EMAIL</th>
<th>PHONE</th>
<th>EMPLOYER</th>
<th>TITLE</th>
<th>I PLEDGE:</th>
<th>Other $</th>
</tr>
</thead>
</table>

(Checks can be made payable to Hofstra University – memo line Katz Endowment)

Contributions can also be made online at: [www.hofstra.edu/katzendowment](http://www.hofstra.edu/katzendowment)

PLEASE CHECK WITH YOUR EMPLOYER ABOUT YOUR COMPANY'S MATCHING GIFT POLICY.
Mergers & Acquisitions

Speakers: Eliot Lebenhart, CPA  
          Kenneth Hauptman, CPA  
          Alex Resnick, CPA  
          Additional speakers TBA

CPE: 2 Credits

Course Code: Pending

Time: 8:00 – 10:00 AM (Be prompt!)

Place: On Parade Diner  
       7980 Jericho Turnpike, Woodbury

Cost:* $25 per person paid in advance  
       $30 per person (includes pre-registered) paying at the door  
       Checks are payable to: NYSSCPA - Nassau Chapter

Chairpersons: Alex Resnick, CPA  
              Eliot Lebenhart, CPA  
              Kenneth Hauptman, CPA

WE LOOK FORWARD TO SEEING YOU THERE!

*Refund/Credit Policy – If you send payment and are unable to attend the monthly meeting, we will issue a credit to you, which will expire in 6 months. There are no refunds.

Please note - meetings are subject to change. Notifications will be sent to all registered attendees via email should this occur.
UPCOMING MEETINGS AND EVENTS

NYSSCPA - NASSAU CHAPTER
SMALL-FIRM MAP COMMITTEE MEETING

June 13, 2018

Speakers: Eliot Lebihart, CPA
Kenneth Hauptman, CPA
Alex Resnick, CPA
Hon. Ruth B. Kraft
Vigorito, Barker, Porter & Patterson, LLP

CPE: 2 Credits
Course Code: Pending

Time: 8:00 – 10:00 AM (Be prompt!)

Place: On Parade Diner
7980 Jericho Turnpike, Woodbury

Cost:* $25 per person paid in advance
$30 per person (includes pre-registered)
paying at the door
Checks are payable to:
NYSSCPA - Nassau Chapter

Chairpersons: Alex Resnick, CPA
Eliot Lebihart, CPA
Kenneth Hauptman, CPA

WE LOOK FORWARD TO SEEING YOU THERE!

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Please note - meetings are subject to change. Notifications will be sent to all registered attendees via email should this occur.
17th Annual
Ellen Gordon
CPAs 4(a): Cause
5K Run/Walk to End Hunger

Thursday, July 12, 2018
Eisenhower Park, Field 1 & 2 • East Meadow, NY
Registration Starts at 4:30 pm • Race Time: 7 pm

Music
Post-race food & refreshments

Awards:
Top 3 Overall Male
Top 3 Overall Female
Top 3 Finishers in each age category
(5 year groups)
Ribbons for all children under 14

Hosted by:

Proceeds will benefit:
www.islandharvest.org

Runner Registration Form

Name ________________________________ Sex M ☐ F ☐
Company ________________________________
Age on Race Day ____________ Birth Date ______________
E-mail ________________________________ Phone ________________________________
Address __________________________________________________________
City __________________ State ______ Zip Code ______________

Applicant Signature ________________________________ Date ______________

Register online at elitefeats.com/cpas5k

Or register today at elitefeats.redpodium.com/cpas-4a-cause-5k-run-walk

Register online at elitefeats.com/cpas5k for $20
(kids under 14 are half price)

Register online at elitefeats.com/cpas5k

For more information:
Kenneth Rick or Stacy Keyes
516-542-6300 • ken.rick@janoverllc.com

www.islandharvest.org

Click here to Register.
17th Annual
Ellen Gordon
CPAs 4(a): Cause
5K Run/Walk to End Hunger

Thursday, July 12, 2018
Eisenhower Park, Field 1 & 2 • East Meadow, NY
Registration Starts at 4:30 pm • Race Time: 7 pm

Proceeds will benefit:
Island Harvest
www.islandharvest.org

Sponsorship Opportunities
We are pleased to sponsor the CPAs 4(a): Cause 5K Run/Walk to benefit Island Harvest, A Food Bank for Long Island.

Please indicate the level of sponsorship:

- **DIAMOND SPONSOR - $2,000** Includes color logo printed on the race tee shirt, display table during registration (sponsor provided), entrance for 13 runners/walkers and logo listing on the Island Harvest website.
- **PLATINUM SPONSOR - $1,500** Includes color logo printed on the race tee shirt, display table during registration (sponsor provided), entrance for 10 runners/walkers and logo listing on the Island Harvest website.
- **GOLD SPONSOR - $1,000** Includes black & white logo printed on the race tee shirt, display table during registration (sponsor provided), entrance for 5 runners/walkers.
- **SILVER SPONSOR - $500** Includes company name printed on the race tee shirt, display table during registration (sponsor provided), entrance for 3 runners/walkers.
- **BRONZE SPONSOR - $250** Includes company name printed on a 2’ × 2’ sign to be displayed at the event.

To register runners/walkers that are included in sponsorship, please email ken.rick@janoverllc.com.

**PLEASE SUBMIT LOGO CAMERA-READY ART IN EPS FILE FOR DIAMOND, PLATINUM, AND GOLD LEVEL SPONSORSHIP**

Due Date: May 23

Music

Post-race food & refreshments

Awards:
- Top 3 Overall Male
- Top 3 Overall Female
- Top 3 Finishes in each age category (5 year groups)
- Ribbons for all children under 14

Register Today!
www.Start2finish.com

For more information:
Kenneth Rick or Stacy Keyes
516-542-6300 • ken.rick@janoverllc.com

www.nysscpa.org

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NASSAU CHAPTER

VOLUME 62 ISSUE 7
MAY 2018

18
GALLO FAMILY 2ND ANNUAL BLOOD DRIVE
IN HONOR OF SUSAN GALLO

Susan was an active member of NCCPAP and volunteered her time and energy to many committees on both the national and local chapter levels. Please join your fellow members for the 2nd Annual Susan Gallo Blood Drive and give the Gift of Life!

Saturday, July 14, 2018
3 Notch Court
Huntington Station, NY 11746
12:00 PM – 6:00 PM

Please join us in honoring Susan’s life
Donate blood in her memory to
Help save the lives of others

Please Give the Gift of Life!

For more information and to schedule an appointment, please go to:
sites.google.com/view/susangalloblooddrive

For travel and medical questions, call 1-800-688-0900.

Download and print out the flyer here: SueGalloBloodDrive2018.pdf

Susan received many blood transfusions throughout her treatment and was always thinking of putting others first. In honor of her spirit and in conjunction with the Long Island Blood Service, The Gallo family is hosting a blood drive in her memory. We have created a website with information and a link to sign up to donate.

Visit sites.google.com/view/susangalloblooddrive/home to register.

Thank you and we hope you will join us on July 14th!
The Gallo Family
Practice Continuity Committee

Organizational Meeting and Roundtable Discussion: Continuity and Succession Planning Issues

Friday, July 27, 2018 – 8:00 AM

On Parade Diner, Woodbury, NY
(7980 Jericho Turnpike, Woodbury New York, 11797; phone # (516) 364-1870)

Ginette Morris
Craig Morris & Company
356 South Oyster Bay Road
Syosset, NY 11791

Tel: (516) 681-1121
Fax: (516) 681-1203
Email: ginette@morriscpas.com

Dear Ginette:

_____ I will be attending the breakfast meeting at 8:00 AM.

_____ Enclosed is my check for $______ at $25.00 per person (must be received by noon, Thursday, July 26, 2018).

_____ I prefer to pay $______ at $30.00 per person at the door. (Walk-in’s may be limited due to space availability).

Checks are payable to NYSSCPA, Nassau Chapter.

Note: Please RSVP by phone, fax or email as early as possible.

Name (print):

Firm Affiliation:

Address:

Telephone:             Cell:

Email:
Networking with Accountants Annual Golf Outing

OPEN TO ALL PROFESSIONALS

NYSSCPANASSAU CHAPTER
ANNUAL GOLF OUTING

Thursday, August 9, 2018
North Hills Country Club, Manhasset, New York
Chairman: Neal Korenberg, CPA, Castellano, Korenberg & Co., CPAs

RAIN OR SHINE  RSVP By August 3, 2018

Reservations are on a first-come, first-serve basis with receipt of payment. Golf Pricing on the next page. See special rate for NextGen CPAs.

10:30am Registration & Brunch
12:00pm Shotgun
5:30pm Cocktails/Buffet Dinner including Raffle Prize Drawing
(cash, credit cards or checks for raffles)

Caddies
Please remember that there will be caddies available at the outing. If you would like to have a caddie assigned to your foursome ahead of the outing, please let me know.

CADDIE FEE OF $120 PER FOURSOME IS NOT INCLUDED IN THE PRICE OF GOLF.

Sponsorships Available!
See next page for details.
Any questions? Carol Pinto
T: (516) 937-9500
F: (516) 932-0485
Email: cpinto@ck-co.com

Raffle Prizes
Donations are greatly appreciated! Your Firm and/ or Institution’s name will be prominently displayed during the raffle drawing of the evening.

We will also be accepting items for giveaways at registration: such as golfballs, tees, divots tools, towels, etc.
REGISTRATION FORM

Please make all checks payable to: NYSSCPA – NASSAU CHAPTER
Mail to: Castellano, Korenberg & Co., CPAs
313 W. Old Country Road
Hicksville, NY 11801

☐ Foursome $1,500
  (includes free Tee sponsorship)
☐ Individual Golfer $425
☐ NextGen CPA’s Discounted Rate
  $285 per golfer
☐ Dinner $150 per person ___

Please note: Caddy’s fee is NOT included in foursome or individual price(s).

Player(s) and/or Dinner Attendee(s) Name(s):
1. ________________________________
2. ________________________________
3. ________________________________
4. ________________________________

FIRM NAME FOR SPONSORSHIP: (For use on signs)
__________________________________________

SPONSORSHIPS

☐ VIP Sponsor — $1,000
  1. Name prominently displayed on signs at all portions of the day (Brunch, Golf & Dinner).
  2. Two representatives for dinner.
  3. Table to showcase at brunch and dinner.

☐ Cocktail/Dinner Sponsor — $500
  1. Name prominently displayed on sign during cocktail/dinner.
  2. One representative for dinner.

☐ Brunch Sponsor — $400
  1. Name prominently displayed on sign during brunch.
  2. One representative for brunch.

☐ Tee Sponsor — $150
  1. Name prominently displayed on sign at tee of one hole.

☐ Prize or Giveaway Sponsor
  1. Name prominently displayed on sign during registration or drawing.

Contact Person: ________________________________
Telephone: ________________________________
Email: ________________________________

Directions

New York via Long Island Expressway:
LIE East to Shelter Rock Road (Exit 35), proceed to light, turn left and cross Expressway. Turn left onto westbound service road. Clubhouse entrance is on the right side.

Eastern Long Island via Long Island Expressway:
LIE West to Searingtown Road (Exit 36). Proceed westbound on Service Road, pass Searingtown Road and Shelter Rock Road. Continue approximately a half mile. Entrance to clubhouse is on the right side.

Proper Golf Attire Required!!

Sport or Golf shirts with collar and sleeves (must be tucked in). Golf shorts or slacks for men, golf skirts or shorts for women. NO CARGO SHORTS OR DENIM ALLOWED ON THE PREMISES.
Networking with Accountants

There was an excellent turnout at the joint Nassau/Suffolk Networking with Accountants event held on Thursday, January 25, 2018 at Fox Hollow Country Club. Meeting and talking over cocktails and dinner was very enjoyable.
EVENT HIGHLIGHTS

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www.nysscpa.org

VOLUME 62 ISSUE 7
MAY 2018

24
Ethics Meeting – January 31, 2018

Attendees at the NYSSCPA Nassau Chapter Annual Ethics Update at Chateau Briand.
EVENT HIGHLIGHTS

Tax Event – February 7, 2018

A Taxation CPE Seminar held jointly by the Nassau & Suffolk chapters was very informative. There was such a wealth of information, that a “part 2” was held the following week.
Practice Continuity – April 27, 2018

Attendees at the Practice Continuity meeting observe as Brian Browne of Mazars USA explains Cybersecurity Risks and Solutions.
Expand Your Knowledge — Join A Committee

Committee Service Application

Professional associations serve an important function of performing for its individual members’ projects that cannot be done as effectively, if at all, individually.

Nassau Chapter members have the opportunity to advance their knowledge and meet other professionals with similar interests. Our chapter is made up of many technical committees to assist our members in staying current on a wide variety of topics.

Use the coupon to join a committee today!

Committee Service Application

☐ Accounting & Auditing
☐ Attorney & Accountants
☐ CFO & Financial Executives
☐ Community Affairs & Public Relations
☐ Cooperation with Bankers & Credit Grantors
☐ Cooperation with Educational Institutions
☐ Employee Benefits
☐ Estate & Personal Financial Planning
☐ Financial Literacy
☐ Litigation & Forensic Service
☐ Management of Accounting Practice
☐ Medical & Other Professionals
☐ Membership
☐ Newsletter
☐ NextGen
☐ Practice Continuity
☐ Real Estate
☐ Small-Practice MAP
☐ Sponsorship
☐ Taxation
☐ Technology
☐ Women’s Focus Group
☐ Other

Name: _________________________________________________
Firm Affiliation: __________________________________________
Address: ________________________________________________
City/State/Zip: ____________________________________________
Phone: ________________________________________________
Email: ________________________________________________

Please forward your response to:
Natalie Verbanac, CPA  | Marcum LLP
750 Third Ave, New York, NY  10017
Natalie.verbanac@marcumpllp.com  | Tel: (212) 485-5550

Advertising Opportunities

If you wish to advertise in the NYSSCPA — Nassau Chapter Newsletter promoting your business or self, please contact Vivian Levy

email: vivianlevy1@gmail.com

Like Us On Facebook
https://www.facebook.com/NYSSCPANassau

Connect With Us On LinkedIn
http://www.linkedin.com/groups?gid=5010322&most-Popular=&trk=tyah&trkinfo=tas%3Anysscpa%20nas

SPONSORSHIP

If you wish to sponsor any Nassau Chapter or committee event, download our sponsorship contract here or contact

Vivian Levy
NYSSCPA Nassau Chapter
c/o KVLM
415 Crossways Park Drive, Suite C
Woodbury, NY 11797
Phone: (516) 938-5219 | Fax: (516) 938-0491
vivianlevy1@gmail.com
Have a Tax Problem?
The following members of the Taxation Committee are available to help answer your questions:

General:
- Robert S. Barnett, CPA, Esq. (516) 931-8100
- Jack Angel, CPA (516) 656-0800
- Robert Lusthaus, CPA, Esq. (516) 937-1366
- Robert J. Schaffer, CPA (516) 937-9500

Taxing Authorities
- Ruth Sattig Betz, CPA (NYS) (516) 249-1919
- Karen J. Tenenbaum, Esq. (631) 465-5000
- Noelle T. Geiger, Esq. (IRS & NYS) (516) 336-2447
- Yvonne Cort, Esq. (IRS & NYS) (516) 931-8100
- Brian Gordon, CPA (NYS) (516) 510-6041

Emergency Assistance Hotline
The committee member to call in the event of the disability or death of a member is:
- John Kearney, CPA (516) 746-5980

Accounting and Auditing Technical Questions Hotline Volunteers
- Thomas O. Linder, CPA (631) 462-1213
- Fred R. Goldstein, CPA (516) 249-2882

Estate and Personal Financial Planning Committee Technical Questions Hotline Volunteers
- Eric Kramer, CPA, Esq. (516) 227-0738
- Richard Zerah, CPA/PFS, CFP, CMFC (516) 735-4717
- Scott Sanders, CPA, PFS, CGMA, CFP, CFS (516) 364-3390

Newsletter Committee
Newsletter produced by Sentinel Innovation
www.sentinelinnovation.com

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lynn@fuentesangelcpas.com

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c/o KVLM, 415 Crossways Park Drive, Suite C, Woodbury, NY 11797
Phone: (516) 938-5219
vivianlevy1@gmail.com

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750 3rd Avenue, New York, NY 10017 | Phone: (212) 485-5550
natalie.verbanac@marcumllp.com

NASSAU CHAPTER NEWSLETTER
NEWSLETTER DEADLINES
All submissions are due the 1st of the month prior to issue date. Email submissions to:
vivianlevy1@gmail.com

The newsletter is downloadable at:
http://www.nysscpa.org/page/nassau-chapters-newsletters

Like Us On Facebook
www.facebook.com/NYSSCPANassau

Connect With Us On LinkedIn
www.linkedin.com/groups/5010322&mostPopular=6&k=tvah&tkn=2as%3Anysscpa%20nas

Return this form to:
Xio Fox, NYSSCPA, 14 Wall Street, New York, NY 10005

NYS Society of Certified Public Accountants
MAIL AND EMAIL ADDRESS CHANGE FORM

CPA Certificate #: _______________________

Name (Last, First, Middle Initial):

Address:

City/State/Zip:

Home Phone:

Email:

Firm Name:

Firm Address:

City/State/Zip:

Business Phone:

Chapter Member: □ Yes □ No

Please send all mail to: □ Firm □ Home

Specify chapter:

□ I would like to receive an email with a direct link to the newsletter on nysscpa.org

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VOLUME 62 ISSUE 7
MAY 2018

30